



County of San Diego

Department of Purchasing & Contracting
5560 Overland Ave, Ste 270
San Diego, CA 92123-1204
PH: (858) 505-6367 FAX: (858) 715-6452

Page : 1 of 1

PURCHASE ORDER

P.O. Number-Rev: 553734 - 0
P.O.Type: STANDARD
Date: 19-MAY-16

Authorized By: *Raquel Harris*
Phone No: RAQUEL HARRIS
(858) 505-6358

SUPPLIER:

INSIGHTS4RESULTS LLC
5173 MARLBOROUGH DR
SAN DIEGO, CA 92116

TERMS:

Payments: NET 30 DAYS
F.O.B. DESTINATION
Freight: PREPAID
Carrier: BEST METHOD

SEND ORIGINAL INVOICE TO:

HEALTH AND HUMAN SERVICES AGENCY
ATTN: FISCAL SERVICES, MS: W403
1255 IMPERIAL AVE, RM 633
SAN DIEGO, CA 92101

SHIP TO:

HEALTH & HUMAN SVCS AGENCY
ADMINISTRATIVE SVCS
4000 RUFFIN RD STE I
SAN DIEGO, CA 92123

The P.O. Number must appear on all invoices and shipping documents. For out-of-State Invoices, the county will pay California Use Tax directly to the State of CA per Permit no. SR FH 25-632384. Prior to first payment, new suppliers must submit a completed IRS Form W-9 and a FTB Form 590. Failure to submit a completed FTB Form 590 will result in back up withholding on all payments per CA Revenue and Taxation Code section 18662. Submit both forms to Auditor & Controller via fax at (858) 694-2060 and mail originals to: County of San Diego, 5530 Overland Ave, Ste 410, San Diego, CA 92123

REQUIRED DELIVERY DATE:

NOTE TO THE SUPPLIER:

ORDER ITEMS:

Line: 1

Quantity: 2000	UOM: DOLLAR	Unit Price: 1.00	Total Line Price: \$ 2,000.00
UNSPSC: 801015.0800	Item #:	Taxable: NO TAX	(including Tax)

Description:

HHSA-PHS: Work Task Order, for 2 consultants to facilitate Health Services Advisory Board (HSAB). PR 110264. (RFSQ 6465.)

Ship Quantity: 2000
Delivery Date:

TOTAL P.O. PRICE (Including Tax): \$ 2,000.00

ADDITIONAL INFORMATION :

END OF ORDER

COUNTY OF SAN DIEGO
STANDARD TERMS AND CONDITIONS OF PURCHASE

1. Acceptance: By acceptance of this purchase order, Vendor agrees to be bound by, and to comply with, these terms and conditions, and all prior or contemporaneous agreements, understandings and representations, oral or written, are superseded. The terms of any proposal from Vendor referred to in this order are included and made a part of the order, but only to the extent of specifying the nature, price and delivery date of the goods and/or services ordered, and then only to the extent that such terms are consistent with the terms and conditions of this order. Any invoice, acknowledgement or other form used by Vendor shall not add to, amend, or modify these terms and conditions.
2. Affirmative Action. If applicable, Vendor shall comply with the Affirmative Action Program for Vendors as set forth in Article IIIk (Commencing at Section 84) of the San Diego County Administration Code which program is incorporated herein by reference. A copy of this affirmative action program will be furnished upon request.
3. Assignment. This order is assignable by County. Except as to any payment due hereunder, this order is not assignable by Vendor without written approval of County.
4. Audit Right. Pursuant to California Government Code Section 8546.7, the parties acknowledge that every contract involving the expenditure of public funds in excess of \$10,000 shall be subject to audit by the State Auditor.
5. Cash Discounts. In connection with any cash discount specified on this order, time will be computed from the later of the date of (i) complete delivery of the goods and/or services as specified, or (ii) receipt of correct invoices. Payment is deemed to be made, for the purpose of earning the discount, on the date of mailing of the County warrant or check.
6. Changes. County shall recognize no change to this order by Vendor without written approval.
7. Compliance With Laws. Vendor shall comply with all laws, codes, regulations, rules and orders (collectively, "Regulations") applicable to the good and/or services to be provided hereunder. Vendor's failure to comply with any applicable Regulations shall constitute a material breach of this purchase order.
8. Governing Law. This contract shall be construed and interpreted according to the laws of the State of California.
9. Delivery. Unless otherwise specified in writing in this order, all shipments will be F.O.B. point of destination. Freight or handling charges are not billable unless referenced on this order. Transportation receipts, if allowed by order, must accompany invoice.
10. Food Products.
 - A. Package. Each package shall be identified with manufacturer's label, which shall conform to the requirements of the Fair Packaging and Labeling Act of the California Business and Professions Code Section 12601-12615.5.
 - B. Compliance. Vendor hereby guarantees that the product or products comprising each shipment made by Vendor to County, as of the date of delivery, is not adulterated or misbranded within the meaning of the U.S. Federal Food, Drug, and Cosmetic Act, as amended, or within the meaning of applicable U.S. State Laws or Municipal ordinances in which the definitions of adulteration and misbranding are substantially the same as those contained in the U.S. Act. Distressed food commodities that are reconditioned, relabeled and/or re-cased are not acceptable.
11. Force Majeure. Each party hereto shall be excused from performance hereunder resulting from delays caused by an act of God, war, civil disturbance, court order, governmental action, laws, orders, regulations, directions or requests, or as a result of events such as public enemies, fires, earthquakes, floods, strikes or other labor disturbances of the other party or any third party, or other cause beyond its reasonable control (financial inability excepted) and which it could not have prevented by reasonable precautions, and, such non-performance shall not be a default hereunder or a ground for termination hereof. In the event that Vendor is excused from performance under this paragraph, Vendor shall take all reasonable actions to resume or provide alternative performance of its obligations at no additional charge to County. If any such delay exceeds thirty (30) days, then County may terminate this order.
12. Formal Bids. In the event this purchase order results from a formal bid, terms and conditions of that bid are incorporated herein and form a part of this purchase order. In the event of any conflict or inconsistency between the terms of this purchase order and the terms of a formal bid, the terms of the formal bid shall control.
13. Hazardous Materials. If the product being supplied presents a physical or health hazard as defined in Title 8 of the California Code of Regulations, Section 5194, or if the product contains one or more of the substances listed on the "List of Hazardous Substances" prepared by the Director of the California Industrial Relations Department pursuant to Labor Code Section 6380, the Vendor shall forward a "Material Safety Data Sheet", pursuant to Cal/OSHA requirements, referencing this purchase order/sub order number with the product shipment.
14. Timeliness. Time is of the essence and this purchase order is subject to termination for failure to deliver on time.
15. Indemnity. County shall not be liable for, and Vendor shall defend and indemnify County and the employees and agents of County (collectively, "County Parties") against any and all claims, demands, liability, judgments, awards, fines, mechanic's liens or other liens, labor disputes, losses, damages, expenses, charges or costs of any kind or character, including attorney's fees and court costs (hereinafter collectively referred to as "Claims"), related to or arising out of this purchase order, and arising either directly or indirectly from any act, error, omission or negligence of Vendor or its contractors, licensees, agents, servants or employees, including Claims caused by the concurrent negligent act, error or omission of County Parties. However, Vendor shall have no obligation to defend or indemnify County Parties against Claims (i) to the extent they arise from the active concurrent negligence of County Parties, or (ii) caused by the sole negligence or willful misconduct of County Parties.
16. Patent Indemnity. Vendor warrants and agrees that it shall defend, indemnify, and hold County harmless, at Vendor's expense, against any claim, suit, or proceeding brought against County insofar as it is based on a claim of infringement of any patent, copyright, trademark, or trade secret of a third party and will pay any costs or damages in connection therewith, including attorney's fees, arising out of this order.
17. Sales and Use Tax. On invoices, Vendor shall show any sales or use tax if applicable, as separate items, giving permit number authorizing collection of Use tax. Vendor shall deduct cash discount before computing Sales or Use Tax.
18. Termination For Cause - Cancellation. The County may, by written notice of default to the Vendor, terminate this order in whole or in part, should the Vendor fail to make satisfactory progress, fail to deliver within the time specified or fail to deliver in strict conformance to specifications or requirements set forth herein. In the event of such termination, the County reserves the right to purchase or obtain the supplies or services elsewhere and the defaulting Vendor shall be liable for the difference between the prices set forth in this order and the actual cost thereof to the County. In such case, the prevailing market price shall be considered to be the fair repurchase price. The rights and remedies of County provided in this Article shall not be exclusive and are in addition to any other rights and remedies provided by law or under this order.
 - 18.1 If, after notice of termination of this order under the provisions of this clause, it is determined for any reason that the Vendor was not in default under the provisions of this clause, the rights and obligations of the parties shall be the same as if the notice of termination had been issued pursuant Clause 19, Termination For Convenience.
19. Termination For Convenience. The County may, by written notice stating the extent and effective date, terminate this order for convenience in whole or in part, at any time. The County shall pay the Vendor, as full compensation for performance until such termination, the unit or pro-rata order price for any delivered and accepted portion of the order. In no event shall the County be liable for any loss of profits on the order or portion thereof so terminated.
20. Warranty. Vendor agrees that any goods and/or services furnished under this order shall be covered by the most favorable commercial warranties Vendor gives to any of its customers for the same or substantially similar goods and/or services. Any warranties so provided shall supplement, and shall not limit or reduce, any rights afforded to County by any other provision of this order or by any applicable Uniform Commercial Code warranties.
21. Disallowance. In the event the Contractor receives payment for services under this contract which is later disallowed by the County, the Contractor shall promptly refund the disallowed amount to the County on request, or at its option, the County may offset the amount disallowed from any payment due to the Contractor under any contract with the County.

County of San Diego
Department of Purchasing and Contracting
REPRESENTATIONS AND CERTIFICATIONS

The following representations and certifications are to be completed, signed and returned with the offer (the term "offer" includes bids, proposals, quotes or any other submission to provide goods and/or services).

BUSINESS TYPE

☒ For-profit ☐ Non-profit ☐ Government

Attach proof of status for Non-profit.

INTERLOCKING DIRECTORATE

In accordance with Board of Supervisors Policy A-79, if Offeror is a non-profit as indicated in paragraph 1 above, Offeror is required to identify any related for-profit subcontractors in which an interlocking directorate, management or ownership relationship exists. If Offeror is a non-profit and will be subcontracting with a related for-profit entity, Offeror must list all such entity(ies) on an attached separate sheet, and authorization must be sought from Board of Supervisors. If Offeror is a non-profit and does not submit such a list, Offeror certifies it has no and will not enter into a subcontract relationship with a related for-profit entity.

BUSINESS REPRESENTATION

Offeror represents as a part of this offer the following information regarding the ownership, operation, and control of its business:

3.1. Are you a local business with a physical address within the County of San Diego? ☒ Yes ☐ No

3.2. Are you certified by the State of California as a:
☐ Disabled Veteran Business Enterprise (DVBE)
Certification #: _____

☐ Small Business Enterprise (SBE)
Certification #: _____

3.3. Are you certified by the U.S. Dept Of Veterans' Affairs as:
☐ Veteran Owned Small Business (VOSB)
Certification # _____

☐ Service Disabled Veteran Owned Small Business (SDVOSB)
Certification # _____

3.4. Estimated percentage of work in this offer to be performed or fulfilled locally (within the geographic boundaries of the County of San Diego): 100 %

DEBARMENT, SUSPENSION AND RELATED MATTERS

4.1. Offeror hereby certifies to the best of its knowledge that neither it nor any of its officers:

4.1.1. Are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency.

4.1.2. Have within a three (3) year period preceding this agreement been convicted of or had a civil judgment rendered against them for commission of fraud or criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

4.2. Except as allowed for in Section 4.2.4, Offeror hereby certifies to the best of its knowledge that neither it nor any of its officers:

4.2.1. Are presently indicted for or otherwise criminally or civilly charged by a government entity (federal, state, or local) with the commission of any of the offenses enumerated in paragraph 4.1.2 of this certification;

4.2.2. Have within a three (3) year period preceding this agreement had one or more public transactions (federal, state or local) terminated for cause or default;

4.2.3. Are presently the target or subject of any investigation, accusation or charges by any federal, state or local law enforcement, licensing or certification body.

4.2.4. If Offeror is unable to certify any of the facts set forth in Sections 4.2.1, 4.2.2 or 4.2.3, it certifies that it has listed on a separate sheet(s) attached to this Representations and Certifications each fact that it cannot certify and the reason it cannot do so. That information must include the specific relevant facts (date(s), contract(s) and individual(s) involved, status of action(s), and any other relevant information) that prevent it from making the requested certifications. The County reserves the right to disqualify an Offeror based upon information disclosed.

4.3. Offeror has a continuing duty to disclose information until contract award/execution and shall report in writing to the County Department of Purchasing and Contracting within five business days of knowing or have any reason to know any change in status as certified in the preceding paragraphs 4.1 and 4.2.

4.4. If Offeror or any of its subcontractors, agents or consultants, have previously contracted with the County to perform related work on this project (e.g. preparing components of the statement of work or plans and specifications for this project), Offeror shall identify those previous agreement(s) and submit that list along with the proposal. Other than as may be submitted on said list, Offeror certifies to the best of its knowledge that it and its proposed subcontractors, agents and consultants have not previously contracted with the County to perform work on or related to this project.

CURRENT COST OR PRICING

Offeror certifies to the best of its knowledge that cost and/or pricing data submitted with this offer, or specifically identified by reference if actual submission of the data is impracticable, are accurate, complete, and current as of the date signed below.

INDEPENDENT PRICING

Offeror certifies that in relation to this procurement:

6.1. The prices in this offer have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with other offerors, with any competitors, or with any County employee(s) or consultant(s) involved in this or related procurements;

6.2. Unless otherwise required by law, the prices that have been quoted in this offer have not been knowingly disclosed by the Offeror and will not knowingly be disclosed by the Offeror prior to opening, in the case of a bid, or prior to award, in the case of a proposal, directly or indirectly to any other Offeror or to any competitor; and

6.3. No attempt has been made or will be made by the Offeror to induce any other person or firm to submit or not to submit an offer for the purpose of restricting competition.

TAX INFORMATION

The Offeror understands that prior to receiving a contract award from the County, the Offeror must submit a completed IRS W-9 form to provide a Federal Tax ID number, or if not available, to provide a Social Security Number (SSN).

CERTIFICATION

The information furnished in Paragraphs 1 through 7 and in the accompanying offer is certified to be factual and correct as of the date submitted and this certification is made under penalty of perjury under the laws of the State of California.

Name: Susan Curtin

Signature: _____

Susan Curtin

Title: President and Owner

Date: 4/22/16

Company/Organization: Insight4Results, LLC

SUBMIT THIS FORM AS DIRECTED IN THE REQUEST FOR SOLICITATION DOCUMENTS OR WITH THE OFFER



County of San Diego

Responses are due Friday,
April 22, 2016 by 5:00 pm.
Late Responses will NOT be
accepted

CONTRACTOR PROJECT PROPOSAL COVER SHEET
Task Order 110264

Please fill in requested information

Contractor:	Name Address	Insights4Results, LLC 5173 Marlborough Drive San Diego, CA 92116
Contact Information:	Name	Susan Curtin
	Phone Number(s)	619-980-1458
	Email	susan@insights4results.com

Please Reference Statement of Work Section in your Responses to the following evaluation criteria.
Please send coversheet with all attachments

**1. Experience/knowledge: As stated in the SOW and Contractor Section Criteria
Rating.**

Rating Criteria Points Value 60

**2. Value/Cost. Bidders will be evaluated on the cost of their solution(s) based on the
work to be performed in accordance with the scope of work. Bidders should submit
a minimum of a high-level detailed budget for performance of services.**

Rating Criteria Points Value 20

**3. Time. Bidders will be evaluated on the ability to perform within the allotted time in
accordance with the scope of work.**

Rating Criteria Points Value 20



April 21, 2016

This proposal from Insights4Results, LLC is in response to Request for Facilitator Proposals_PHS Work Task Number 110264.

1. Scope of Work/Purpose

Insights4Results proposes to provide Health Services Advisory Board (HSAB) two highly experienced consultants to facilitate discussion in the areas of team building, strategic planning, and process improvement for three to five hours at the upcoming HSAB retreat on June 4, 2016 or other date as determined by HSAB.

2. Background Information

The consultants have extensive experience with projects aiming to improve the health and wellness of all residents in San Diego County. In addition, Insights4Results consultants have experience with projects intended to advance an integrated wellness and health care system where all residents have access to affordable, comprehensive and quality care and guided by the principles that everyone has access to affordable care and that the care is coordinated in a responsive and culturally sensitive manner. They are also guided by the principles that services are integrated, seamless and comprehensive and wellness of mind, body and spirit is pursued for every resident.

3. Goals and Objectives

3.1. Goal: Insights4Results consultants will facilitate the HSAB retreat on June 4, 2016 or other date as determined by HSAB.

3.2. Objectives:

3.2.1. Insights4Results consultants will ensure all members understand and agree with respect to the board main duties and responsibilities as well as future strategies.

3.2.2. Insights4Results consultants will develop a proposed outline for the HSAB retreat by May 22, 2016.

Insights4Results consultants will facilitate the three to five hours' retreat on June 4, 2016 or other date as determined by HSAB.

3.2.3. Insights4Results consultants will develop action plans with the feedback provided by the participants by June 30, 2016.

4. Specific Requirements for Service Delivery

4.1. Insights4Results consultants will conduct an initial meeting with PHS Administration staff to plan for the HSAB retreat.

4.2. Insights4Results consultants will develop a proposed outline for the event with topics identified in the initial meeting and submit to the County for approval to include:

4.3. Insights4Results consultants will facilitate the three to five hour retreat and lead discussion on agenda topics.



4.4. Insights4Results consultants will compile feedback provided and information discussed at the retreat to create a final report as described in Section 5.

5. Data Collection and Reporting Requirements

5.1. Insights4Results consultants will provide a final written report no later than June 30, 2016. They will include at a minimum:

5.1.1. Identified areas of opportunity and develop proposed recommendations to address.

5.1.2. Action plan and timeline for implementation of recommendations.

5.1.3. Recommend modifications, if needed, to the current board vision, mission, and guiding principles to enhance HSAB's value to the County Board of Supervisors.

In summary, because of the closely aligned mission of the HSAB and Insight4Results consultants, Insight4Results will provide two highly experienced consultants to work together to achieve the above goals within the allotted budget of \$2,000.00

Summary of Consultants' Experiences

Susan Curtin, M.S., B.C.C., C.E.A.P., is an award winning organization development professional with over 26 years of experience assisting organizations with employee engagement, development and succession planning. She has a Master's degree in Counseling and is a Board Certified Coach and Certified Employee Assistance Professional. She served as Employee Assistance Manager from 1984-1994, Program Manager of Diversity Commitment from 1994 to 1998, and Career Development Manager from 1999 to 2003 for the City of San Diego. She also served as Training & Development Manager for Health & Human Service Agency, County of San Diego from 2003 to 2007 before launching her consulting firm, Insights4Results, LLC in 2008. Susan created the first yearlong Award winning Management Development Institute for leaders in Health and Human Service Agency, County of San Diego.

Stacy Starkka, Ph.D.(c), M.B.A., is a consulting industrial-organizational psychologist with over 20 years of experience assisting communities, organizations, teams, and individuals with assessments, learning, and collaboration initiatives. She is a Sr. Consultant for CSU Institute for Palliative Care where she works with Vista Community Clinics on a HRSA funded grant to improve Triple Aim outcomes within the diabetes population. Stacy develops and delivers multi-session training programs for healthcare professionals to practice interdisciplinary collaboration that improves patient, employee, organization, and community outcomes.

Summary of Experience with Similar Projects

Below are summaries of experience that Susan and Stacy have working with similar projects.

Similar services provided by Susan Curtin

Designed, developed and delivered training and facilitation services to HHSA and client organizations, including UCSD Medical Center, served over the past 8 years. Trainings were



both instructor-led and computer based which incorporated self-directed training activities. The curriculum design was based upon Adult learning theory and incorporated blended learning activities.

"During her tenure at HHSA, Susan helped launch two employee leadership development programs (Managers Development Institute and Frontline Leadership Development Program) that won the National Association of Counties Achievement Award. Past graduates of these programs still remember and talk about Susan very fondly because she was an excellent listener; great mentor and gave her students a lot of food for thought."

Savi Swick | OD Manager HHSA | County of San Diego | 01-20 2010 |

Designed and delivered Teambuilding sessions and Leadership Development efforts to Behavioral Health, First Five San Diego and Environmental Health & UCSD Medical Center from 2007-2013.

"Susan was able to reason, prod, cajole and ultimately move my consciousness from a position of wanting to win and prevail to a position of acceptance and crucial and self-examination, which enabled me to chart a new course for myself and for my team.

James Barker | Administrative Director Nephrology Programs | UCSD Medical Center | 01-11-2010

Facilitated an all day Strategy meeting for the Board of Pivot Charter School, their Executive Director and Advanced Academics resulting in an updated Mission and Vision statement and clarification on educational model to best insure meeting their strategic goals.

Facilitated a Board meeting with Public Health and the 3 Trauma centers to gain agreement and buy in on shared commitment for delivering services to the San Diego County population.

"Susan's expertise in planning and facilitating group discussions to achieve established objectives was invaluable during this transition period for the trauma medical directors and nurse managers. She successfully kept the group focused, allowed for pertinent discussions of the issues and led the group to important decision making that will impact the future of the Trauma Medical Audit Committee."

Carmel Angelo | Emergency Medical Services 12-12-2008

Working as the Training & Development Manager for HHSA, County of San Diego I designed and delivered multiple Train the Trainer (T4T) programs to roll out County initiatives and mandates to the 6,800 employee organization on an annual basis. In addition, designed and delivered a Train the Trainer for the Global Performance Coaching Program created for Alcon Pharmaceuticals. I have also designed and delivered Train the Trainer (T4T) for the licensed Managing4Results™ (M4R) program delivered to clients who purchased the license for the program.

"Susan and John I can't thank you enough for a phenomenal job introducing the M4R model to Galderma. I truly believe this will provide us the opportunity to **"Create a Culture of Developing Others"** that Galderma has never seen before. This is not just a coaching model; it is investing in the growth of our people that this organization is starving for. Look forward to the continued partnership in the future."



Bob Zimmerman Director, Leadership and Performance Development
Galderma – Fort Worth, Texas 04-30-15

Similar services provided by Stacy Starkka

Stacy has served as Sr. Consultant for a HRSA-funded program titled Diabetes TLC (Training and Leadership Care) since its beginning in May 2014. The initiative is a three-year partnership between Vista Community Clinic (VCC), California State University San Marcos (CSUSM) School of Nursing, and CSU Institute for Palliative Care (IPC). The program's three goals align closely with HRSA's overarching program goal to develop collaborative practice environments that deliver patient-centered quality healthcare that is safe, efficient, effective and equitable.

The first goal is to collaborate with CSUSM School of Nursing and CSU Institute for Palliative Care in creating a new Nurse Interprofessional Team Leader Certificate program that will provide senior-year CSU BSN nursing students with education and skills necessary to participate in and lead Interprofessional Collaborative Practice (IPCP) teams. The second goal is to provide fieldwork and clinical experience opportunities for CSU nursing students in the Certificate program to learn and practice the principles of interprofessional team work and coordinated, team-based care. The third goal is to Use the Triple Aims framework, to evaluate the impact of the nurse-led, interprofessional collaborative practice intervention targeting patients with uncontrolled diabetes.

Stacy develops curriculum for and trains Interprofessional Collaborative Care Teams to serve approximately 350 hard-to-manage adult patients with uncontrolled diabetes (A1C levels greater than 9%). She is a guest lecturer in the program's Nurse Interprofessional Team Leader Certificate Program and a guest lecturer for courses on interprofessionalism for CSU School of Nursing. The impact of the interprofessional and coordinated team-based care approach is being measured using all three domains of the "Triple Aims" framework developed by the Institute for Healthcare Improvement, namely patient experience, cost and clinical quality.

It is expected that the introduction of nurse-led interprofessional collaborative care teams into the community clinic setting will result in significant improvements in a series of clinical outcomes for VCC patients with diabetes. The primary clinical outcome the program is measuring is the percent of patients with controlled blood glucose levels (i.e. HbA1c level <8%). A cohort of 350 VCC patients with uncontrolled diabetes are being tracked over a two-year period. Baseline clinical measures for patients are gathered retrospectively from archival electronic health records. The evaluation also assesses patient satisfaction and quality of care. Patient treatment costs are being compared between baseline and intervention years.

The most difficult barrier encountered as of now, one-third through the study's timeline, is the clinic's traditionally high levels of turnover exacerbated by environmental factors, such as a shortage of primary care physicians, nurses, and nearly all roles in clinical healthcare. Another barrier is time for and expense of employees leaving the clinic to attend training and coaching sessions. Without funding to repeat the initial training many more times than planned, it has been challenging to spread the enthusiasm for new collaborative behaviors.

The initial training was designed with four components: Interprofessional Leadership, Communication Skills and Teamwork and Palliative Care Fundamentals. The Interprofessional



Leadership, Communication Skills and Teamwork modules each involved a full day of training. Dedicated to ensuring that VCC leadership and project team members have the key interprofessional skills needed to be successful with the project, content was tailored specifically based on a needs assessment from participants at the beginning of the project.

Based on feedback from the care teams in booster sessions, Stacy and a palliative care physician conducted clinic-based observations and team coaching applied to current issues at each clinic. Stacy conducted structured interviews and administered surveys that show the program's goals are being met and extremely well received. In addition, Stacy developed additional custom course materials for face-to-face and online learning as a result of these data. Evaluations from participants consistently receive the highest scores possible.

"As a consultant with CSU Institute for Palliative Care, Stacy has provided several training sessions on interprofessional collaboration. These have been outstanding experiences for our staff. Stacy actively engages participants with interactive and thought provoking activities. She presents a safe learning environment for them to interact with one another without fear of judgment or negative consequences.

She has customized activities to fit our workplace and our teams, allowing our staff to further connect to the information and apply it to their individual situations." *-Sarah Neill, Chief Operations Officer, VCC*

"The coaching sessions are phenomenal! By receiving real time guidance and instruction, staff members see immediate results of increased communication and leadership. Stacy, and her team, are extremely professional and careful not to interrupt clinic flow. They observe actual situations where teamwork, communication, and leadership can be improved, and promptly provide suggestions for behavior or systemic change. The experience is truly invaluable." *-Cathy Berglund, Nursing Services Manager, VCC*

"Stacy is extremely thorough in her approach to training at an organizational level. She conducts structured interviews with a member of each staff position, and uses their feedback to shape her coaching sessions. She provides timely communication to administration at each interval, and collaborates to improve the way in which staffs are trained. She is more than willing to present findings and recommendations to other members of leadership, always keeping the mission of the organization at the forefront." *-Victoria Harris, Clinical Programs Manager, VCC*



**TASK ORDER NUMBER 110264
COUNTY OF SAN DIEGO, HHSA, PUBLIC HEALTH SERVICES
AGREEMENT WITH CONTRACTOR
FOR HEALTH SERVICES ADVISORY BOARD RETREAT FACILITATOR**

ATTACHMENT B. CONSULTANT COST ESTIMATE
Please provide and complete below by 4/22/2016.
The maximum total amount is \$2,000.

CONSULTANT NAME:	Insight4Results, LLC		
DATE:	4/22/16		
STAFF NAME/ POSITION	TOTAL HOURS	HOURLY RATE	TOTAL COST
Susan Curtin	4.5	\$210	\$945.00
Stacy Starkka	4.5	\$210	\$945.00
SUBTOTAL STAFF COST			
HARD COSTS	DESCRIPTION		TOTAL COST
	Final Report Materials		\$110.00
SUBTOTAL HARD COST			\$110.00
TOTAL COST PROPOSED			\$2,000.00

Task Order 110264
County of San Diego
HHSA – PHS - HSAB
Exhibit A – Statement of Work

1. Scope of Work/Purpose

Health Services Advisory Board (HSAB) is seeking a consultant to facilitate discussion in the areas of team building, strategic planning, and process improvement for three to five hours at the upcoming HSAB retreat on June 4, 2016 or other date as determined by HSAB.

2. Background Information

HSAB is an Advisory Board to the San Diego County Board of Supervisors focused on improving the health and wellness of all residents in San Diego County. It provides the Board of Supervisors with expertise, timely advice and options to advance an integrated wellness and health care system where all residents have access to affordable, comprehensive and quality care. HSAB is guided by the principles that everyone has access to affordable care and that the care is coordinated in a responsive and culturally sensitive manner. HSAB is also guided by the principles that services are integrated, seamless and comprehensive and wellness of mind, body and spirit is pursued for every resident.

Listed below are the primary duties and responsibilities of HSAB excerpted from the San Diego County Administrative Code:

- Provide support and recommendations on new policies and programs,
- Review HHSA budget,
- Examine variables which impact access to health care and develop an integrated set of recommendations aimed at an improved health-care delivery system,
- Review legislation and make recommendations to the Board of Supervisors and HHSA Director,
- Solicit and provide a forum for public input, advice, and proposed solutions, and
- Assist the HHSA Director in assessing community issues which could have fiscal impact on County government and make recommendations regarding such impacts.

The Board also supports *Live Well San Diego*. *Live Well San Diego*, developed by the County of San Diego, is a comprehensive, innovative regional vision that combines the efforts of partners inside and outside County government to help all residents be healthy, safe, and thriving. All HHSA partners to this agreement, to the extent feasible, are expected to advance this vision, which was implemented in a phased approach. The first phase, *Building Better Health*, was adopted by the Board of Supervisors in 2010, and focuses on improving the health of residents and supporting healthy choices. The second phase, *Living Safely*, seeks to ensure residents are protected from crime and abuse, neighborhoods are safe, and communities are resilient to disasters and emergencies. The third and final phase, *Thriving*, was adopted in 2014 and focuses on promoting a region in which residents can enjoy the highest quality of life.

Information about *Live Well San Diego* can be found on the County's website http://www.sdcounty.ca.gov/hhsa/programs/sd/live_well_san_diego/index.html and a website designated to the vision <http://www.LiveWellSD.org>

**Task Order 110264
County of San Diego
HHSAB – PHS - HSAB
Exhibit A – Statement of Work**

3. Goals and Objectives

3.1. Goal: Contractor shall facilitate the HSAB retreat on June 4, 2016 or other date as determined by HSAB.

3.2. Objectives:

3.2.1. Ensure all members understand and agree with respect to the board main duties and responsibilities as well as future strategies.

3.2.2. Develop a proposed outline for the HSAB retreat by May 22, 2016.

3.2.3. Facilitate the three to five hours retreat on June 4, 2016 or other date as determined by HSAB.

3.2.4. Develop action plans with the feedback provided by the participants by June 30, 2016.

4. Specific Requirements for Service Delivery

4.1. Contractor shall conduct an initial meeting with PHS Administration staff to plan for the HSAB retreat.

4.2. Contractor shall develop a proposed outline for the event with topics identified in the initial meeting and submit to the County for approval to include:

4.3. Contractor shall facilitate the three to five hour retreat and lead discussion on agenda topics.

4.4. Contractor shall compile feedback provided and information discussed at the retreat to create a final report as described in Section 5.

5. Data Collection and Reporting Requirements

5.1. Contractor shall provide a final written report no later than June 30, 2016. Contractor shall include at a minimum:

5.1.1. Identified areas of opportunity and develop proposed recommendations to address.

5.1.2. Action plan and timeline for implementation of recommendations.

5.1.3. Recommend modifications, if needed, to the current board vision, mission, and guiding principles to enhance HSAB's value to the County Board of Supervisors.